



Every Soldier has a first sergeant, and they deserve the best the Army can provide. The infantry first sergeant is the unit's senior NCO and the organization's lifeblood. They are critical to their Soldiers' success. (Original U.S. Army photo by Sgt. Kevin Stabinsky/Graphic by *NCO Journal*)

The Infantry First Sergeant Manning Issue

The Master Sergeant Shortfall in First Sergeant Positions

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Every Soldier has a first sergeant, and they deserve the best one the Army can provide. The infantry first sergeant is the unit's senior NCO and the organization's lifeblood. The first sergeant position in infantry units is vital to the Army's mission and its formations' success, as the infantry's mission is to close with and destroy the nation's enemies in close combat.

However, some units fill first sergeant positions with sergeants first class. This reality severely affects readiness and retention, and the Army can't afford to assume undue risk as it transforms for the future.

To analyze the infantry master sergeant shortfall in first sergeant positions, we can examine the problem's background and context, frame the issue, and consider a practical solution.

Background and Context

The first sergeant position has been essential to the Army since its inception. *The Noncommissioned Officer Guide* details the first sergeant's role. It lists positional expectations across communications, leadership, operations, program management, readiness, and training management (Department of the Army [DA], 2020).

Infantry first sergeants serve as the primary advisors to company commanders, and they employ their experience and knowledge to train the unit for war and care for Soldiers and their families simultaneously. First sergeants are the bedrock of the NCO corps at the company level, and their successes in the position have measurable impacts across their organizations.

The contributions from the first sergeant position and the first sergeants themselves are important as the Army transitions to multi-domain operations (MDO) and aligns with Chief of Staff of the Army (CSA) Gen. Randy A. George's focus on warfighting (Lacdan, 2023). When master sergeants decline service in the first sergeant position, their decision causes a next-man-up situation within the rank structure and presents problems for the organization.

Defining the Problem

The master sergeant shortage in first sergeant positions creates problems beyond the company. The Army Force Management Model (AFMM) further expands on this problem, as the AFMM assists the Army in managing the total Army and delivering ready formations for employment by the combatant commanders (CCDRs) (DA, 2021). Delivering ready formations is a vital part of completing the Army's mission. The master sergeant shortfall is a capability gap, highlighted by readiness and retention.

Readiness

Everything begins with strategy. The National Security Strategy (NSS), National Defense Strategy (NDS), and National Military Strategy (NMS) are driving documents that feed into The Army Plan (TAP) (DA, 2021). (Please note that this article's research and composition followed the election of a new president but preceded his inauguration; the new administration may have introduced or updated sources of greater relevance.)

The Joint Capabilities Integration and Development

System (JCIDS) is a needs-based process that assists the Joint Requirements Oversight Council (JROC) in identifying capability gaps and delivering change recommendations with viable solutions (DA, 2021). The master sergeant shortfall is a capability gap because their absence creates a readiness deficit within the impacted organizations.

First sergeants bear responsibility for many tasks (both administrative and tactical) that call on their experience and potential (Kussart, 2024). Sergeants first class who step into the role lack the expertise to be as effective as possible, and that is by design. Sergeants first class earn their Career Development (CD) time as platoon sergeants. As sergeants first class assume first sergeant positions, other NCOs must work one level up. This circumstance creates the potential for degraded results

in training, both at home stations and in the combat training centers (CTCs).

This situation isn't in the infantry professional development model but is a reality across the force. The Army must address and correct the first sergeant position as it transitions toward MDO (Kussart, 2024).

Retention

The Army needs Soldiers to fight and win the nation's wars. Even as the Army incorporates technology into warfighting, Soldiers will continue to have a place. The reality is that master sergeants can decline first sergeant positions, but sergeants first class can't. Senior leaders

across the field units don't want master sergeants in first sergeant positions who don't wish to be first sergeants.

Furthermore, the field units reward the eager sergeants first class with potential for increased responsibility over the master sergeants who don't want to serve in those positions. First, the master sergeant who declined first sergeant service already achieved the rank and takes up allocations sergeants first class cannot receive for promotion while serving as first sergeants. Second, the sergeants first class don't receive credit for time served in the position (DA, 2022).

This situation is unfair to the sergeants first class because infantry first sergeants carry a heavier burden than infantry master sergeants, and sergeants first class in first sergeant positions carry more expectations from their command sergeants major than the master



Sgt. 1st Class William Call, acting first sergeant of Charlie Company, 1st Battalion, 125th Infantry Regiment, prepares for a combined arms exercise at Sennelager Training Area, Germany. The first sergeant position is essential to the U.S. Army and has been since its introduction into the rank structure in 1781. (Michigan Army National Guard photo by Maj. Charles Calio)

sergeants who declined first sergeant service.

Meanwhile, the Soldiers and junior officers see this scenario in daily practice and decide to reclassify to other career fields or leave the Army due to limited promotion opportunities. The master sergeant shortfall impacts retention as the sergeants first class (and below) may elect to explore careers outside the Army.

Solution

The solution lies in a two-pronged approach through policy and organizational changes. The costs and risks for each of my below proposed changes are minimal.

Policy

The problem is a whole-of-Army capability gap. So, infantrywide change must start at the Army level as the service prioritizes promoting master sergeants to fill first sergeant positions.

The first step aligns with talent identification. The Army must audit the entire infantry first sergeant/master sergeant population in time and space before taking the required problem-solving measures. The audit must include current duty locations, duty positions, CD complete statuses, and retirement statuses.

The 8H additional skill identifier (ASI) acknowledges master sergeants who have served a minimum of 24 months in a first sergeant position, while the M special qualification identifier (SQI) acknowledges master sergeants who have successfully served in a first sergeant position for a minimum of 365 days (DA, 2023). These codes will aid in the master sergeant audit, providing the Army with a clear understanding of the composition and location of the master sergeant population.

The next step covers talent activation and specifying master sergeant service in first sergeant positions. DA Pam 600-25 states that the first sergeant position is the career developmental position for infantry master sergeants. The policy gap is that current guidelines only specify first sergeant service if master sergeants wish to attend the U.S. Army Sergeants Major Academy (SGM-A) and become sergeant majors (DA, 2022). This has the effect of incentivizing first sergeant time only for those motivated to achieve higher rank, the same population who would have sought the diamond to begin with.

The policy change recommendation of specifying first sergeant service for 24 months upon promotion to master sergeant directly addresses this capability gap as it takes first sergeant service from an implied task to a specified



Sgt. 1st Class Igor Stanisic, acting first sergeant, Charlie Company, 2nd Battalion, 34th Armored Regiment, 1st Armored Brigade Combat Team, 1st Infantry Division, delivers his final remarks on his time as acting first sergeant at Studnica Range, Drawsko Pomorskie Training Area, Poland, Sept. 8, 2021. Some units fill first sergeant positions with sergeants first class, which severely affects readiness and retention. The Army can't afford to assume undue risk as it transforms for the future fight. (U.S. Army photo by Spc. Max Elliott)

task. This change removes the choice from the master sergeant to serve as a first sergeant. The change will be most effective with a military personnel (MILPER) message from the Headquarters, Department of the Army (HQDA) announcing the change with updated language in DA Pam 600-25 specifying 24 months of first sergeant service upon future master sergeants.

Furthermore, the recommendation is that current master sergeants who haven't served in first sergeant positions must serve 365 successful days in first sergeant positions to earn the M SQI or face involuntary separation before their retention control point. This arrangement allows the field units to address the immediate master sergeant shortfall within their formations and facilitate the infantry in promoting the sergeants first class successfully performing in the first sergeant positions.

The first general officer in the chain of command must act accordingly to transition out of the Army master sergeants who formally decline first sergeant service. The officer should do so with dignity, purpose, and respect.

The first sergeant service expectation must extend to the centralized promotion board for future promotions with updated policy guidance. HQDA distributes MILPER messages before every centralized promotion board. Adding the first sergeant service specification into the Sergeant First Class Evaluation Board MILPER message sets conditions for expectation management and overall culture change toward master sergeants serving in first sergeant positions.

An added "yes/no" check block in the centralized board file denoting acceptance of first sergeant utilization upon selection for (and promotion to) master sergeant will reinforce the shift in first sergeant prioritization. The recommended change is for the board to prioritize promoting first sergeants first (sergeants first class who select *yes* for first sergeant service).

Those sergeants first class who select *no* can still receive favorable Order of Merit List (OML) numbers and may still become master sergeants from the OML once those who select *yes* promote first. However, their promotion to master sergeant will still incur first sergeant service if those sergeants first class become

master sergeants because the first sergeant position is the career developmental position for master sergeants.

This recommendation takes the choice of first sergeant service from the master sergeant level and places it at the sergeant first class level before promotions happen. The recommended changes will allow the field level to appropriately manage their talent pools or efficiently facilitate transitions from the Army as needed.

Time served does not count for sergeants first class in first sergeant positions. The master sergeant shortfall results in sergeants first class serving as first sergeants, which forces the staff sergeant to serve as a platoon sergeant to fill the void.

Current proponent guidance acknowledges NCOs who serve in higher-level positions and perform well by merit (DA, 2024a). However, this board guidance does

not state that the time served will satisfy the CD time at their current grade.

The recommendation is that leadership time served in the higher position must count toward CD time completion at the current grade, so long as the NCO has at least 12 months of CD time in the appropriate position at their current grade. This isn't credit for time served at the next grade for Army design reasons.

This recommendation acknowledges that most sergeants first class don't get to choose whether they serve as the first sergeant in this instance, due to operational needs and the significant importance of

the first sergeant position. Codifying this language into centralized board guidance and DA Pam 600-25 will arm the field units with policy-supported ammunition to select the right personnel to serve in positions of higher responsibility and manage their talent in line with proponent-codified career progression language.

This reasoning also applies to the Career Management Field (CMF) 11 staff sergeants serving as platoon sergeants, under the same guidelines. Twenty-four months of service in the standard CD positions is the preferred general method, and the field units must align their organizational talent management practices to the CMF's professional development model. However, this recommendation addresses the current reality of the field units. It also allows everyone to see that their time served



Sgt. 1st Class Robby Burns (right), acting first sergeant, C Troop, 1st Squadron, 2nd Cavalry Regiment, and a Lithuanian soldier prepare for a combined arms exercise near Pabrade, Lithuania, Oct. 29, 2014. Field units reward eager sergeants first class (SFCs) with first sergeant potential over master sergeants (MSGs) who don't want to serve. (U.S. Army National Guard photo by Spc. Seth LaCount)



First sergeant service expectations must extend to the centralized promotion board for future promotions with updated policy guidance. Headquarters Department of the Army distributes Military Personnel (MILPER) messages before every centralized promotion board. Adding the first sergeant service specification into sergeants first class evaluation boards MILPER messages sets conditions for expectation management and overall culture change to master sergeants serving as first sergeants. (U.S. Army photo by Pfc. Denice Lopez)

counts toward CD completion and that the successful time served at the higher leadership level makes them highly competitive for promotion to the next rank.

The frocking rules for sergeants first class serving as first sergeants have gaps to address (Herrera, 2024). Current frocking rules allow the first colonel in the chain of command to select suitable sergeants first class to wear the rank of first sergeant within their organization (DA, 2024b). However, current frocking rules don't align with a promotion list as in the previous period, where the Army frocked sergeants first class to first sergeant.

Previous frocking rules allowed promotable sergeants first class to serve in first sergeant positions. The Army acknowledged that the sergeants first class would become master sergeants during the fiscal year, thus earning the rank and grade required for the position.

The Army left those sergeants first class in position for 24 months as the master sergeant-backed first sergeant instead of sending them to career-broadening assignments meant for sergeants first class. Current frocking rules don't require the sergeants first class to be CD complete or otherwise competitive for promotion to master sergeant, which works to the detriment of the individual.

The current rules don't protect the sergeants first class from receiving career-broadening assignment instructions

while serving as a frocked first sergeant. Placing a 12-month minimum CD time standard on frocked sergeants first class, allowing the field units to CD-stabilize them, and protecting them from follow-on assignments will strengthen frocking rules and provide institutional assistance to field unit talent management efforts.

These recommended policy changes will set conditions for organizational action to address and correct the master sergeant shortfall in first sergeant positions.

Organization

Policy changes set the conditions for organizational success, but field unit leadership is the backbone of local-level success. Talent management in the field units is crucial because the field units must deliver combat-ready formations in line with the CSA's guidance (Lacdan, 2023).

Field units must find the total master sergeant population within their installations versus where the talent should be. Units will not see master sergeant gains to their installations if their location is overstrength. So, identifying the master sergeant population — and which ones have not served as first sergeants — allows for talent reallocation at the unit level.

Units should manage master sergeants with accepted retirement packets and medical situations as appropriate

and inform those who have not served but are capable that the unit needs their service in first sergeant positions. Division-level leaders must speak with each CD-incomplete master sergeant who is otherwise capable yet declines service as a first sergeant when positions are available.

The leaders should discuss the potential Bar to Continued Service to provide promotion opportunities to master sergeants for sergeants first class serving as first sergeants.

Furthermore, field units must look at each sergeant first class installed or who will serve in the future and ensure that those selected for first sergeant service align with the CMF proponent guidance for promotion consideration to master sergeant. Leaders must choose sergeants first class to serve as first sergeants who are otherwise competitive for promotion consideration (for the Expert Infantryman's Badge, for example).

If the proponent-certified talent doesn't exist within a battalion, the battalion must engage with the brigade to find a suitable sergeant first class to fill that position. Releasing OML numbers to the division-level G1 for their population will aid command teams in managing talent at the unit level.

The Army promotes leaders based on demonstrated performance in their current rank and documented potential for success at the next rank. Stepping into an organization as the first sergeant presents a challenge to most sergeants first class and master sergeants. So, it's normal for leaders to take a company without any (or minimal) prior first sergeant experience.

The first sergeant position is a rewarding experience. However, the extra responsibility and trust placed upon the first sergeant makes the position seem staggering. Engaged leader development is essential in setting conditions for success and alleviating friction points across the board, especially for newly installed first sergeants.

The relationship between the brigade/battalion command sergeants major and the first sergeants is vital in the success or failure of the first sergeants, personally and professionally. Bringing back the first sergeant course may not happen. However, engaged leader development and mentoring sessions will set the tone for integrating the first sergeants into the organizations and arming first sergeants with dialogue and resources that will aid them in being successful (Herrera, 2024).

Successful command sergeants major know the importance of properly integrating and mentoring their first sergeants, fostering open dialogue, and instilling confidence and trust in them to perform successfully without fear of losing their roles for minor infractions. Minor mistakes happen at all levels, but successful leader development recognizes the value of learning from failures (where suitable) versus instilling a no-fail culture.



Sgt. 1st Class Patrick White is laterally appointed to first sergeant at Schofield Barracks, Hawaii, Aug. 9, 2023. The master sergeant (MSG) shortfall in infantry first sergeant positions severely impacts readiness and retention, and the Army cannot afford to assume undue risk while transforming for the future. (U.S. Army photo by Sgt. Nicole Hedgepeth)

Cost

The costs for these proposed solutions are low. Moving the first sergeant decision to the sergeant first class level saves money by prioritizing the promotion of first sergeant candidates first.

The recommendation of counting successful time served in higher leadership positions opens the door for more competition for centralized promotions at sooner levels across the infantry. This approach will also provide a younger average within the SGM-A student population due to promotion efficiency across the ranks. The infantry saves money and shows a reinvestment in leaders who successfully assume leadership roles of greater responsibility for Soldiers and their families.

When Sergeant Major of the Army Michael R. Weimer spoke to SGM-A Class 75 in November, he addressed the potential of aligning Special Duty Assignment Pay (SDAP) to the coded first sergeant positions due to the added responsibilities the Army places upon the position. Aligning SDAP to the position would speak to the added responsibilities that first sergeants take on for the Army, and it would also address unit-level costs that first sergeants incur while investing personal resources into their organizations.

First sergeants usually design and purchase coins, facilitate unit team-building functions, and make minor purchases to care for their facilities from their paychecks. While most first sergeants would report that they love what they do, the first sergeant SDAP is a small cost for highlighting the added responsibilities placed upon the position and aiding the first sergeants in offsetting expenses incurred while caring for their units.

Risk

The associated risk is minimal. Identifying the infantry master sergeant population will take time and resources. Retirements and medical separations will occur in response to solution implementation. Implementation will drive refinement with minimal impacts on the infantry's developmental design.

Consistent dialogue and education must happen, as this is a major change in how leaders at all levels continue to analyze and support the first sergeant position. However, now is the time for change to ensure that the infantry delivers the ready teams needed for the future Army.

Conclusion

The infantry master sergeant shortfall in first sergeant positions can be understood by analyzing the issue's background and context. After framing the problem, the Army can arrive at a practical solution to address the issue.

The shortfall severely impacts readiness and retention, and the Army cannot afford to assume undue risk while transforming for the future. The problem requires a solution because first sergeants assume the immense responsibility of training the unit for war and caring for Soldiers and their families simultaneously. Every Soldier has a first sergeant, and they deserve the best the Army can provide. ■

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